

US FEDERAL CONTRACT

User Guide



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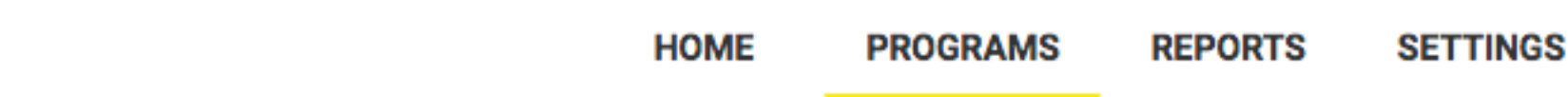
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1 Structure of the Application

Following are the elements of the application.

1.1. Header

Menu



Current User Information

JUSTIN CLARK | Logout

Quick Program Search

The search bar helps you search program and switch to it.

1.2. Section Editor

Each section has an edit button. Use it to change values within that section. Once done you can save it or revert back the changes

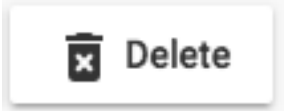


1.3. Tool bar

A program and order can be downloaded in PDF format. Use the **Print** button to download it.



At few places we have **Delete** button, this would delete the entity under consideration

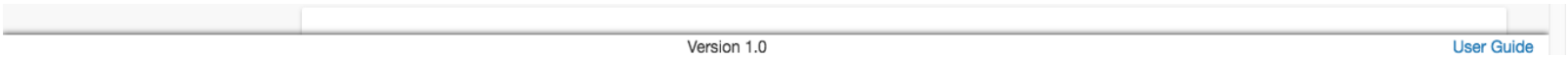


1.4. Pagination

The lists are supported with pagination at the bottom; use it navigate between the pages



1.5. Footer



It shows application’s versions and you can download this guide from the application.

2 Understanding the homepage

It has list of programs grouped by recent actions

- Name of the program
- Date when the program was updated
- Navigate to program

2.1 Recently Updated

It shows top 5 programs that have been recently updated by anyone in the application

RECENTLY UPDATED		
#	Name 1	Updated On 2
1	Defence and Security Accelerator	May 24, 2017
2	Counter-proliferation 3	May 24, 2017
3	Domestic Programme	May 24, 2017
4	Cross-Government Prosperity Fund Programme	May 24, 2017
5	Domestic Programme Fund	May 24, 2017

2.2 Recently Created

It shows top 5 programs that have been recently created by anyone in the application

RECENTLY CREATED		
#	Name 1	Created On 2
1	Broadband Delivery	May 23, 2017
2	Domestic Programme Fund 3	May 18, 2017
3	State Children's Insurance	Apr 26, 2017
4	Cross-Government Prosperity Fund Programme	Apr 25, 2017
5	Domestic Programme	Apr 25, 2017

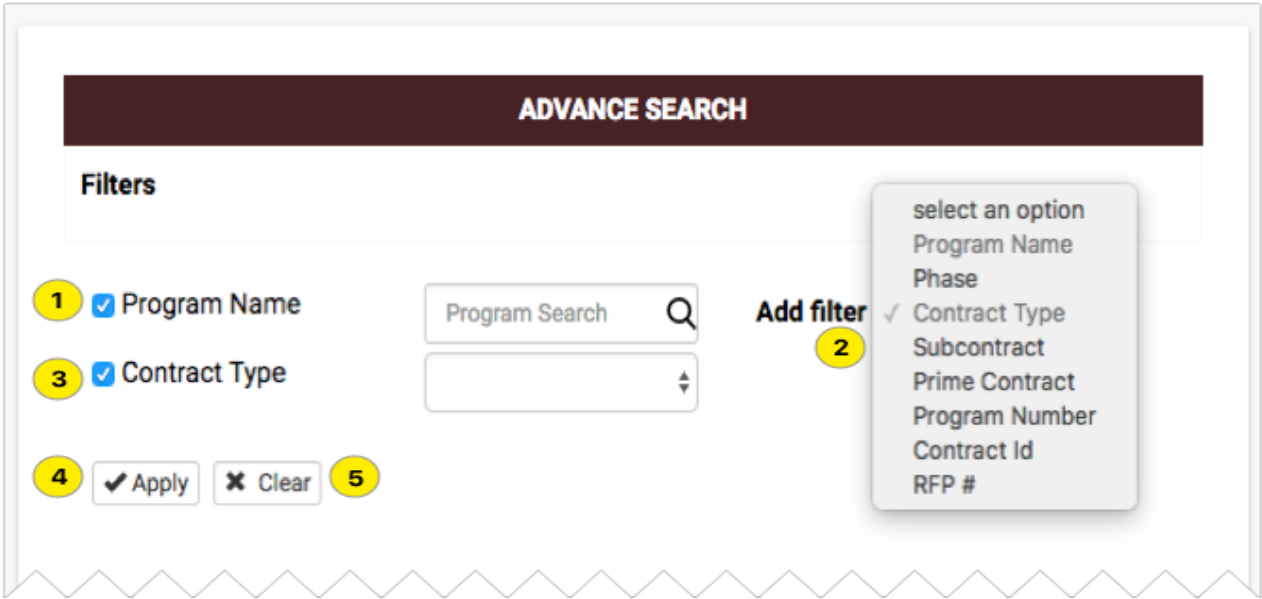
2.3 Recently Viewed

It shows list of last 5 programs you have viewed

RECENTLY VIEWED		
#	Name 1	Viewed On 2
1	Broadband Delivery 3	May 24, 2017
2	Defence and Security Accelerator	May 24, 2017
3	Counter-proliferation	May 24, 2017
4	Domestic Programme	May 24, 2017
5	Cross-Government Prosperity Fund Programme	May 24, 2017

2.4 Advance Search

Using this you should be able to drill down to specific set of programs



- 1. Program Name- - the default filter; you can deselect it
- 2. use it to add more filters
- 3. Newly added filter
- 4. Apply –button to get the results.
- 5. Clear –to reset values of filter(s)

3 How to search and view a Program?

3.1 Searching a program

3.1.1 Filters

There are Filters in Program Tab that helps you input different attributes to search for



- 1. default filter
- 2. use it to add more filters
- 3. additional unselected filter
- 4. another selected filter
- 5. Apply – button to get the results.
- 6. Clear - to reset values of filter

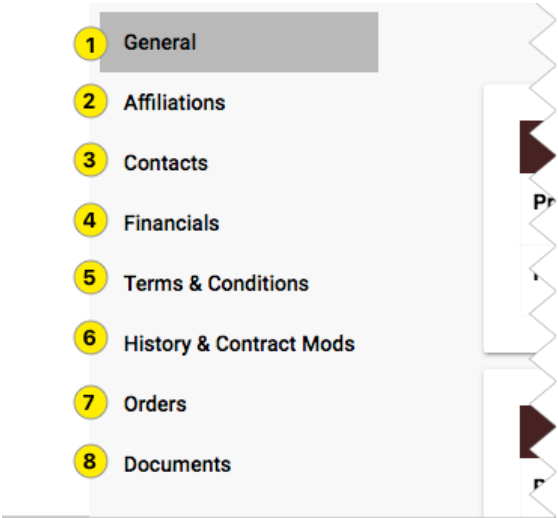
3.1.2 List of programs

PROGRAMS	
#	Name
1	Broadband Delivery
2	Domestic Programme Fund
3	State Children's Insurance
4	Cross-Government Prosperity Fund Programme
5	Domestic Programme
6	Counter-proliferation
7	Army Federal Program

- 1. Name of program
- 2. Click on any program to show detail

3.2 Viewing a program

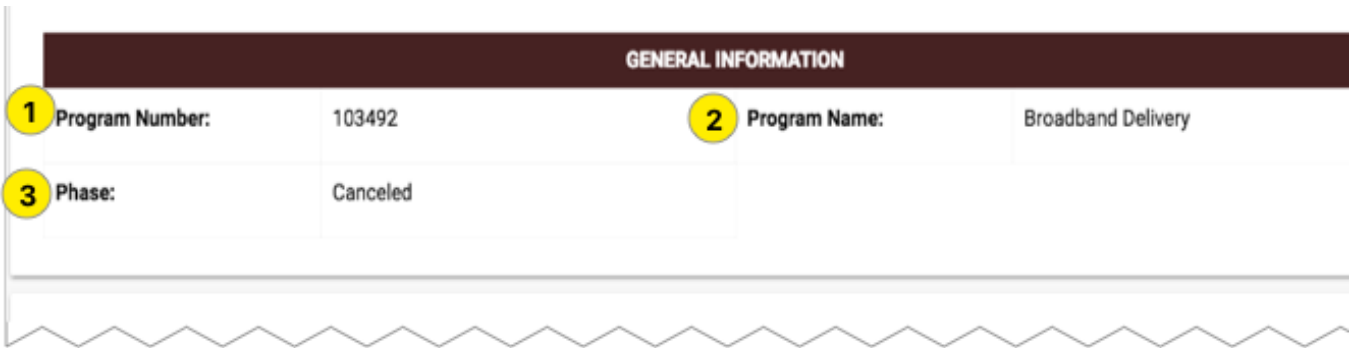
A program's details have been segregated into following 8 tabs



3.2.1 General Tab

It has following sections

General Information



- 1. Auto generated program number -
- 2. The program name
- 3. Phase

Summary Information

SUMMARY INFORMATION					
1	RFP #:	32568	2	Letter Contract #:	a85791
3	Prime Contract #:	OoD-2345	4	Contract Id #:	35894
5	Role:	Prime	6	Subcontract #:	35894.12

- RFP#

Contract Types

CONTRACT TYPES	
#	Contract Type 1
1	Time & Material
2	Cost Plus Incentive
3	Firm Fixed Price

Primary Place of Performances

PRIMARY PLACE OF PERFORMANCES	
#	Places 1
1	Arkansas
2	California
3	Delaware

Award Basis

AWARD BASIS					
1	Award Basis:	Multiple	2	If task/delivery orders then competition is:	Discretionary

Service Offerings

SERVICE OFFERINGS	
#	Service Offering 1
1	Applications Maintenance
2	Health Care Finance Administration (HCFA)
3	Business Continuity

Corporate Identifier

CORPORATE IDENTIFIER					
1	CAGE Code:	OCVK8	2	Corporate DUNS:	07-781-7617
3	Corporate Location:	225 Grandview Ave, Camp Hill, PA			

- Letter Contract #
- Prime Contract #
- Contract Id#
- Role
- Subcontract #

- It can take multiple values

- Multiple Places

1. Multiple or Single
2. can be one of
 - a. Discretionary
 - b. None
 - c. Required

1. can be one of the service offerings

1. One of the CAGE Codes
2. Corporate DUNS attached with CAGE code
3. One of the Corporate Location

Renewal

RENEWAL	
1 Current Term Expires On:	May 31, 2017
2 Next notice of intent due by:	May 17, 2018
3 Valid exercise requires (day[s] notice):	3

- 1. Date of Current Term Expiration
- 2. Due date of Next notice of intent
- 3. Day(s) of notice required for valid exercise

Dates

DATES	
1 Award Date:	May 24, 2017
2 Maximum Term Start Date:	May 25, 2017
3 Maximum Term End Date:	May 31, 2017
4 Base Period Start Date:	May 31, 2017
5 Base Period End Date:	May 31, 2018

- 1. Award Date
- 2. Maximum Term Start Date
- 3. Maximum Term End Date
- 4. Base Period Start Date
- 5. Base Period End Date

Option Periods

OPTION PERIODS			
#	Number 1	Start Date 2	End Date 3
1	12558	May 24, 2017	May 31, 2017
2	12885	Jun 4, 2018	Jun 29, 2018

- 1. Number
- 2. Start Date
- 3. End Date

Procurement Regulations

PROCUREMENT REGULATIONS		
#	Regulation 1	Notes 2
1	NASA	Notes
2	DFARS	Notes

- 1. Regulation
 - a. FAR
 - b. NASA
 - c. DFARS
 - d. Other
- 2. Notes

Owners

OWNERS		
#	Owner 1	Type 2
1	Justin Clark	Finance
2	Newm	Legal

- 1. Owners
- 2. Type

3.2.2 Affiliations Tab

AFFILIATIONS	
#	Affiliation Type 1
1	IS THE SAME ISS
2	IS A RELATED CL
3	IS A CROSS REFE

AFFILIATIONS	
#	Program Name 2
1	Army Federal Program 3
2	Federal 1
3	Newfederal

- 1. Affiliation Type
- 2. Program Name
- 3. Click on any program to detail.

3.2.3 Contacts Tab

CONTACTS		
#	Type 1	Contact 2
1	Awarding Agency	Federal
2	Payment Office	Thomson Brett

1. Type
- a. Awarding agency

b. Govt. POC

c. Contractor

d. Payment Office
2. Contact

3.2.4 Financials Tab

It has following sections

Financial Control data

FINANCIAL CONTROL DATA	
1 Responsibility Center:	Journal of Higher Policy

1. Responsibility Centre

Payment Information

PAYMENT INFORMATION	
1 Payment Office:	Andrew Flintop
2 Special Billing Provisions:	None

1. Payment office
2. Special Billing Provisions

Mechanics

MECHANICS			
1 Authorized Users:	Albert	2 Contract Ordering:	Centralized

1. Authorized Users
2. Contract Ordering
- a. Centralized

b. Decentralized

c. General

d. INS

Financial

FINANCIAL		
1 Original Estimated Lifecycle Contract Value:		\$9,000.00
2 Current Estimated Lifecycle Contract Value:		\$16,000.00
3 Current Obligated Funds:		\$5,000.00

1. Original Estimated Lifecycle Contract Value
2. Current Estimated Lifecycle Contract Value
3. Current Obligated Funds

3.2.5 Terms & Conditions Tab

TERMS & CONDITIONS			
1 Name	2 Description	3 Date	
1 Service Contract Act	Notes	May 24, 2017	
2 Economic and MOnetary Union (EMU) Compliance	Notes	May 31, 2017	

1. Name
2. Description
3. Date

3.2.6 History & Contract Mods Tab

It has following sections

History

HISTORY			
1 Date	2 Last Modified By	3 Description	
1 May 24, 2017	Brait Lee	Notes	
2 May 25, 2017	Justin Clark	Notes	

1. Date
2. Last Modified By
3. Description

Show Cause/ Cure Notice

SHOW CAUSE / CURE NOTICE			
1 Show Cause / Cure Notice:	NO	2 Show Cause / Cure Notice Date:	May 31, 2017
3 Actions:	Initial		

1. Show Cause / Cure Notice
2. Show Cause / Cure Notice Date
3. Actions

Contract Mods

CONTRACT MODS	
#	Name 1
1	876 5/24/2017 2
2	876 5/24/2017

1. Name - Which contains list of contract mods
2. If user click on any name, then user will get the detail

3.2.7 Documents Tab

It shows files organized into folders

DOCUMENTS FOLDERS

Funds

Legal

New Folder

DOCUMENTS

Name	Size	Type	Time	Date
Affiliations	49kb	png	7:11 PM	May 24, 2017
user-guide	1311kb	docx	7:11 PM	May 24, 2017
user-guide	2309kb	pages	7:10 PM	May 24, 2017

1. Folder
2. New Folder

1. Name
2. Size
3. Type
4. Time
5. Date

3.2.8 Orders Tab

Each program has the list of order; use it to navigate through them

List

ORDERS			
#	Name	Type	Effective Date
1	22151	Firm Fixed with EPA	May 31, 2017
2	125698	Cost Plus Incentive	Jun 15, 2017

1. Orders Name
2. Type
3. Effective Date

3.3 How to view an Order?

To view an order from Order tabclick on the respective Order Name. The order details page will appear in which the order's attributes are organized into following sections

Details

DETAILS

Order Name

22151

Scope

Center Outsourcing

Order Type

Firm Fixed With EPA

Effective Date

May 31, 2017

Pop From

May 24, 2017

Pop To

Jun 14, 2017

Proposal Date

May 25, 2017

Resp Center

Scotiabank

Customer

Michel

Description

Notes

1. Orders Name
2. Scope
3. Order Type
4. Effective Date
5. Pop From
6. Pop To
7. Proposal date
8. Resp Center
9. Customer
10. Description

Financials

FINANCIALS

Fixed Price Cumulative

\$10,000.00

Cost Cumulative

\$5,000.00

Fee Cumulative

\$1,000.00

Total Cumulative

\$16,000.00

Obligated Amount

\$5,000.00

Limit of Funds

Amount

\$100,000.00

Notification

Jun 14, 2017

Percentage (%)

50

1. Fixed Price Cumulative
2. Cost Cumulative
3. fee Cumulative
4. Total Cumulative
5. Obligated Amount
6. Limit of Funds Amount
7. Limit of Funds Notification
8. Limit of Funds Percentage

Decentralized Order

DECENTRALIZED ORDER	
1 Payment Office	Federal
2 Contract Administrator	Andrew Flintop
3 Contract Admin Backup	Thomson Brett

- 1. Payment Office
- 2. Contract Administrator
- 3. Contract Admin Backup

Contracting Officer

CONTRACTING OFFICER	
#	Name 1
1	Federal
2	Michel Clark

- 1. Name of Contracting Officer

Account Manager

ACCOUNT MANAGER	
#	Name 1
1	Michel Clark
2	Andrew Flintop

- 1. Name of Account Manager

Security

SECURITY	
1 <input checked="" type="checkbox"/> Required	
2 Security Requirement Notes	Notes

- 1. Required
- 2. Security Requirement Notes

Modifications

MODIFICATIONS		
#	Name 1	Effective Date 2
1	3452352	Jun 30, 2017

- 1. Name
- 2. Effective Date

3.4 How to view an Order Mod?

To view an “Order Mod” click on the respective Mod Order Name from the “Order”Modifications section. The attributes are organized into following sections

Details

← Modification - 3452352 of 22151 9			
DETAILS			
1 Name	3452352	2 Scope	Certification And Deployr
3 Order Type	Cost Sharing	4 Change Type	Bilateral
5 Pop From	Jun 5, 2017	6 Pop To	Jun 6, 2017
7 Proposal Date	May 31, 2017	8 Effective Date	Jun 30, 2017

- 1. Orders Name
- 2. Scope
- 3. Order Type
- 4. Change Type
- 5. Pop From
- 6. Pop To
- 7. Proposal date
- 8. Effective Date
- 9. Back to list

Financials

FINANCIALS		
Field 1	Amount 2	Adjustment 3
Fixed Price	\$10,000.00	Plus
Cost	\$5,000.00	Plus
Fee	\$1,000.00	Plus
Obligated	\$5,000.00	Plus

- 1. Fields
- 2. Amount
- 3. Adjustment

Changes Made

CHANGES MADE	
1 Add/Change Funding Data	
2 Administrative Change	
3 Change PoP	

- 1. Add/ Change Funding Data
- 2. Administrative Change
- 3. Change Pop

4 How to download the details of a Program?

4.1 Downloading a program

A program can be downloaded in PDF format. Use the *Print* button on the program detailsscreen to download it.

DOMESTIC FUND CONTRACT

PDF Print

Delete

GENERAL INFORMATION

Edit

Program - State Children's Insurance			
General Information			
Program Number :	103483		Phase: Reopen
Summary Information			
RPF #:	6545-5456		Letter Contract No#: 2999-5454
Prime Contract #:	464-5445		Contract Id #: 566-8787
Role	Subcontractor		Sub Contract #: 6656-545
Contract Types			
SNo.	Contract Type		
1	Firm Fixed Incentive		
Place Of Performances			
SNo.	Place		
1	Washington		
Award Basis			
Award Basis	Multiple	If task/delivery orders then competition is	Discretionary
Service Offerings			

The PDF format of program

4.2 Downloading details of an order

An Order can be downloaded in PDF format. Use the *Print* button on the order details screen to download it.

PROGRAM- COUNTER-PROLIFERATION

Order - 289

PDF Print

Del

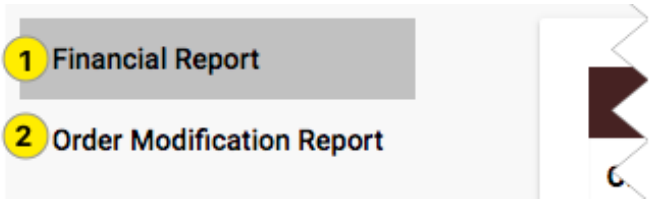
DETAILS

Edit

Order Name - 1398			
Details			
Order Type :	Cost Sharing		Scope : Program management
Pop From :	Apr 26, 2017		Pop To : Apr 27, 2017
Effective Date :	Apr 26, 2017		Resp Center : test
Proposal Date :	Apr 19, 2017		Customer : Michel Clark
Description :	Used for testing		
Financial			
Fixed Price Cumulative :	\$22,545,655.00		Cost Cumulative : (\$4,454,567.00)
Fee Cumulative :	\$456,456,787.00		Total Cumulative : \$474,547,875.00
Obligated Amount :	(\$44,545,678.00)		
Limits Of Funds			
Amount :	\$45,000.00		Notification : Apr 27, 2017
Percentage(%) :	44		

The PDF format of an order

5 Reports



- 1. Financial report
- 2. Order Modification Report

5.1 How to download the Financial Report?

Get the financial attributes of programs across application which can be exported to excel.

Taking an example where in you are looking for programs with Original Estimated Lifecycle Contract Value greater than \$ 100.

Step 1: Key in original estimated lifecycle contract value you are looking for and click “Submit” button

- 1. Original Estimated Lifecycle Contract Value
- 2. Current Estimated Lifecycle Contract Value
- 3. Current Obligated Funds
- 4. Submit
- 5. Reset

Step 2View the report and click the “Export” button to download

FINANCIAL REPORT		
	Greater than	Less than
Original Estimated Lifecycle Contract Value	\$100.00	\$50,000.00
Current Estimated Lifecycle Contract Value	\$100.00	\$10,000.00
Current Obligated Funds	\$100.00	\$10,000.00

#	Program Name	Estimated Life Contract Value		Current Obligated Funds
		Original	Current	
1	Domestic Programme	\$5,000.00	\$5,400.00	\$1,000.00

- 1. Original Estimated Lifecycle Contract Value
- 2. Program Name
- 3. Estimated Lifecycle Contract Value
- 4. Current Obligated Funds
- 5. Reset
- 6. Use the export button to download it in excel format

5.2 How to download Order Modification Report?

Gets list of Mod Order of the selected order(s)

Step 1 Selecta program, all orders for the program will appear. Then select the respectiveorder(s) and click “Submit” button

- 1. Program
- 2. Order Names
- 3. Check box
- 4. Submit
- 5. Reset

Step 2View the report and click the “Export” button to download

ORDER MODIFICATION REPORT									
Program:	Broadband Delivery								
Prime Contract Number:	OoD-2345								
Award Date:	May 24, 2017								
Maximum Term Start Date:	May 25, 2017								
Maximum Term End Date:	May 31, 2017								
Order: 22151									
Order Mod #	Orde Type	Effective Date	Pop From	Pop To	Obligated Amount	Fixed Price Amount	Cost Amount	Fee Amount	Total Amount
3452352	Cost Sharing	Jun 30, 2017	Jun 5, 2017	Jun 6, 2017	\$5,000.00	\$10,000.00	\$5,000.00	\$1,000.00	\$16,000.00

- 1. Program
- 2. Order no.
- 3. Order modification Fields
- 4. Use the export button to download it in excel

6 How to modify a program?

Program Editor

Each section has an edit button. Use it to change values within that section. Once done you can save it or revert back the changes



6.1 General Tab

General Information

GENERAL INFORMATION

1 Program Number:

103492

3 Program Name*:

Broadband Delivery

2 Phase:

Canceled

1. Program Number – auto generated number and cannot be edited
2. Program Name – text which is used to identify the program
3. Phase

SummaryInformation

SUMMARY INFORMATION

1 RFP #:

32568

2 Letter Contract #:

a85791

3 Prime Contract #:

OoD-2345

4 Contract Id #:

35894

5 Role:

PRIME

6 Subcontract #:

35894.12

1. RFP #
2. Letter Contract #
3. Prime Contract #
4. Contract Id #
5. Role – User can take one of the following values
1. Prime
2. Subcontractor
6. Subcontract Id #

Contract Types

CONTRACT TYPES

Contract Type 1

1 Time & Material

2 Cost Plus Incentive

3 Firm Fixed Price

4 Select an option

2 Clear

Clear

Clear

Done

1. Contract Type
2. Clear - User can remove the selected contract type.

Primary Place of Performance

PRIMARY PLACE OF PERFORMANCES

Places 1

1 California

2 Place search

Clear

Done

1. Places - user can select multiple.

Award Basis

AWARD BASIS

1 Award Basis:

Multiple

If task/delivery orders then competition is: 2

DISCRETIONARY

1. Award Basis: User can take one of the following values
- Multiple

• Single
2. If task/delivery orders, then competition is:
1. Discretionary
2. None
3. Required

Service Offerings

SERVICE OFFERINGS

SaveCancel

#	Service Offering	
1	Applications Maintenance	Clear
2	Business Continuity	Clear
3	Health Care Finance Administration (HCFA)	Clear
4	Select an option	Done

1. Service Offerings

Corporate Identifier

CORPORATE IDENTIFIER

SaveCancel

1 CAGE Code:	OCVK8	Corporate DUNS:	2 07-781-7617
3 Corporate Location:	225 GRANDVIEW AVE, CAMP HILL, PA		

1. Cage Code
2. Corporate DUNS –Auto generated
3. Corporate Location

Renewal

RENEWAL

SaveCancel

1 Current Term Expires On:	2017-05-31	Next notice of intent due by:	2 2018-05-17
3 Valid exercise requires (day[s] notice):	3		

1. Current Term Expire On
2. Next notice of Intent due by
3. Valid exercise requires (day[s] notice)

Dates

DATES

SaveCancel

1 Award Date:	2017-05-24			
2 Maximun Term Start Date:	2017-05-25	Maximun Term End Date:	3 2017-05-31	
4 Base Period Start Date:	2017-05-31	Base Period End Date:	5 2018-05-31	

1. Award Date

2. maximum Term Start Date
3. Maximum Term End Date
4. Base Period Start Date
5. Base Period End Date

Option Periods

OPTION PERIODS

SaveCancel

#	Number	1	Start Date	2	End Date	3	
1	12558		May 24, 2017		May 31, 2017		Clear
2	12885		Jun 4, 2018		Jun 29, 2018		Clear
3							Done

1. Number
2. Start Date
3. End Date

Procurement Regulations

PROCUREMENT REGULATIONS

SaveCancel

#	Regulation	1	Notes	2	
1	NASA		Notes		Clear
2	Select an option				Done

1. Number
2. Start Date
3. End Date

Owners

OWNERS

SaveCancel

#	Owner	1	Type	2	
1	Justin Clark		finance		Clear
2	Newdean		Legal		Clear
3	user search		Select An Option		Done

1. Owner
2. Type

6.2 Affiliations Tab

AFFILIATIONS

Save

Cancel

#	Affiliation Type 1	Program Name 2	
1	IS A COUNTER CL	State Children's Insurance	<div>Clear</div>
2	IS A RELATED CL	Cross-Government Prosperity Fund Programme	<div>Clear</div>
3	IS CONSOLIDATED	Counter-Proliferation	<div>Clear</div>
4	<div>select an option</div>	<div>Program Search</div>	<div>Done</div>

1. Affiliation Type
2. Program Name

6.3 Contacts Tab

CONTACTS

Save

Cancel

#	Type 1	Contact 2	
1	Awarding Agency	Fred	<div>Clear</div>
2	Contractor	Andrew Flintop	<div>Clear</div>
3	Payment Office	Thomson Brett	<div>Clear</div>
4	<div>Select an option</div>	<div>Contact Search</div>	<div>Done</div>

1. Type
2. Contact

6.4 Financials Tab

Financial Control Data

FINANCIAL CONTROL DATA

Save

Cancel

1

Responsibility Center:

1. Responsibility Center

Payment Information

PAYMENT INFORMATION

Save

Cancel

1

Payment Office:

Andrew

2

Special Billing Provisions:

1. Payment Office
2. Special Billing Provisions

Mechanics

MECHANICS

Save

Cancel

1

Authorized Users:

Contract Ordering:

2

Select an option

1. Authorized Users
2. Contract Ordering

Financial

FINANCIAL

1	Original Estimated Lifecycle Contract Value:	9000 \$
2	Current Estimated Lifecycle Contract Value:	\$16,000.00
3	Current Obligated Funds:	\$5,000.00

1. Original Estimated Lifecycle Contract Value
2. Current Estimated Lifecycle Contract Value
3. Current Obligated Funds

6.5 Terms & Conditions Tab

TERMS & CONDITIONS

Save

Cancel

#	Name 1	Description 2	Date 3	
1	Service Contract Act	Notes	May 24, 2017	<div>Clear</div>
2	Economic and MOnetary Union (EMU) Compliance	Notes	May 31, 2017	<div>Clear</div>
3	<div>Select an option</div>			<div>Done</div>

« Previous

1

Next »

1. Name
2. Description
3. Date

6.6 History & Contract Mods Tab

It has following sections

New History

NEW HISTORY

1 Date*

Last Modified By*

3 User Search

2 Description

- 1. Date
- 2. Last Modified By
- 3. Description

Show Cause / Cure Notice

SHOW CAUSE / CURE NOTICE

1 Show Cause / Cure Notice:

No

Show Cause / Cure Notice Date:

2 2017-05-31

3 Actions:

Initial

- 1. Show Cause/Cure Notice
- 2. Show Cause/ Cure Notice Date
- 3. Actions

New Contract Mods

NEW CONTRACT MOD

1 Contract Mod* #

Effective Date*

2

3 Change Type*

Select an option

Comment:

6

CHANGES MADE

#

7 Type Of Change Made

1

Select an option

Done

- 1. Contract Mod#
- 2. Effective Date
- 3. Change Type
- 4. Comment
- 5. Type of Change Made

7 How to add a program?

Step 1:Click on “Programs” tab

Step 2: Click the “new” button. This will open the new program form



Step 3: Fill the details of the program.

The fields to be filled are the one on the General Tab

Step 4: Click on save button.

New program will be created and saved

8 How to add an order to a program?

Step 1:View the program to which order needs to be added

Step 2: Navigate to the order tab

Step 3: Click the “new” button. This will open the new order form

Step 4: fill following sections

Details

- 1. Orders Name
- 2. Scope
- 3. Order Type
- 4. Effective Date
- 5. Pop From
- 6. Pop To
- 7. Proposal date
- 8. Resp Center
- 9. Customer
- 10. Description

Financials

- 1. Fixed Price Cumulative
- 2. Cost Cumulative
- 3. fee Cumulative
- 4. Total Cumulative
- 5. Obligated Amount
- 6. Limit of Funds Amount
- 7. Limit of Funds Notification
- 8. Limit of Funds Percentage

Decentralized Order

- 1. Payment Office
- 2. Contract Administrator
- 3. Contract Admin Backup

Contracting Officer

CONTRACTING OFFICER

#	Name 1	
1	Michel Clark	Clear
2	Fred	Clear
3	<div>Contracting Officer Search</div>	Done

1. Name

Account Manager

ACCOUNT MANAGER

Save

#	Name 1	
1	Michel Clark	Clear
2	Andrew Flintop	Clear
3	<div>Account Manger Search</div>	Done

1. Name

Security

SECURITY

Sav

1 ☒ Required

2 Security Requirement Notes

Notes

1. Required
2. Security Requirement Notes

Step 5: Click on save button.

New order will be created and saved

9 How to add a modification to an order?

Step 1:View the program to which modification needs to be added

Step 2: Navigate to the order tab

Step 3: Open the order to which modification needs to be added

Step 4: Navigate to the modifications section

Step 5: Click the “new” button. This will open the new modification form

Step 6: Fill following sections

Details.

New Modifications of 22151

SaveCancel

DETAILS

1 Name*	<div></div>	Scope:	2 <div>select an option</div>
3 Order Type:	<div>select an option</div>	Change Type:	4 <div>select an option</div>
5 Pop From:	<div></div>	Pop To:	6 <div></div>
7 Proposal Date:	<div></div>	Effective Date:	8 <div></div>

1. Name
2. Scope
3. Order Type
4. Change Type
5. Pop From
6. Pop To
7. Proposal date
8. Effective Date

Financials

FINANCIALS

Field 1	Amount 2	Adjustment 3
Fixed Price:	<div></div>	<div>select an option</div>
Cost:	<div></div>	<div>select an option</div>
Fee:	<div></div>	<div>select an option</div>
Obligated:	<div></div>	<div>select an option</div>

1. Field
2. Amount
3. Adjustment

Changes Made

1

CHANGES MADE

2

☐ Add/Change Funding Data

☐ Administrative Change

☐ Change PoP

☐ Change Scope/SOW

☐ Incorporate Proposal

☐ Option Exercise

- 1. Change Made
- 2. Check Box

Step 7: Click on save button.

New order will be created and saved

10 How to upload a new document to a program?

Step 1:Viewthe program to which document needs to be added

Step 2:Create a new folder or select an existing folder

DOCUMENTS FOLDERS

Funds

Legal

1

☒

☐

- 1. New Folder

Step 3:Choose file(s)

NEW FILE

1

Choose Files

No file chosen

<div>2</div> <div>Name</div>	<div>Size</div> <div>3</div>	<div>Status</div> <div>4</div>	<div>Actions</div> <div>5</div>
------------------------------	------------------------------	--------------------------------	---------------------------------

Upload all

Stop

- 1. Choose File
- 2. Name
- 3. Size
- 4. Status
- 5. Actions

Step 4: Click “Upload All” button

The application starts uploading and updates the status of each file.

11 How to remove a program?

Step 1: Open the program which you want to delete.

Step 2:Click the “delete” button at top of the program.

Delete

Step 3:A conformation message pops up. Click “Sure” button.

CONFIRM

Are you sure you want to delete this Program- Agricultural Statistics ?

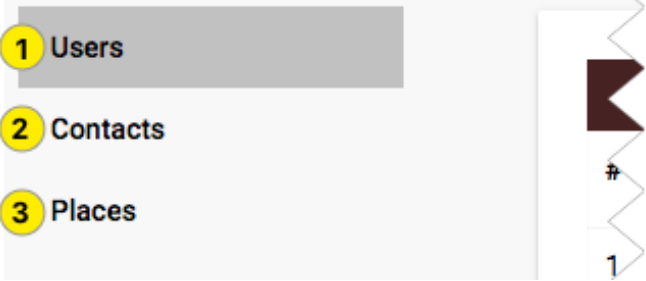
Sure

Cancel

This would remove the program from all the application.

12 How to manage data in auto complete fields?

Use *settings* to manage users, contacts and places across the application



- 1. Users
- 2. Contacts
- 3. Places

12.1 Managing Users

12.1.1 Viewing list of users

USERS						New
#	Name 1	Login 2	Mobile 3	Email 4	Type 5	
1	Albert Smith	Albert.smith	+919856985542	Sksushil999@Gmail.Com	Legal	Edit Delete
2	Big Show	william.beth	+10245698569	Willil54@Gmail.Com	Finance	Edit Delete
3	Brait Lee	Lee.Brait	+14545454545	LeeCooper@Gmail.Com	Legal	Edit Delete
4	Jerry	jerry_123	+102894759869	Jerry@Msn.Com	Legal	Edit Delete

- 1. Name
- 2. Login
- 3. Mobile
- 4. Email
- 5. Type

12.1.2 How to add a user?

Step 1:Open the users tab in settings

Step 2:Click“New” button to open the form

Step 3: Fill in details.

NEW USER

7 Save Cancel

1 First Name*:

2 Last Name:

3 Login*:

4 Mobile*:

5 Email*:

6 Type*:

- 1. First Name
- 2. Last name
- 3. Login
- 4. Mobile
- 5. Email
- 6. Type
- 7. Save

Step 4:Click the “Save” button

This will add the new user

12.2 Managing Contacts

12.2.1 Viewing Contacts

CONTACTS					
#	Name 1	Email 2	Telephone 3	Address 4	
1	Andrew Flintop	Andrew.Contact@Gmail.Com	9876543210	Roland Witvoet , Richard Paul, Liza R, 110003, India	Edit Delete
2	Fred	Fed_1@Gmail.Com	+14589345869	New Street , Wylas, Paris, 75020, France	Edit Delete
3	Michel Clark	Michel@Gmail.Com	310-775-2525	Ciudad Colonial (Santo Domingo), San Juan, Montserrat, 00801, West Indies	Edit Delete

- 1. Name
- 2. Email
- 3. Telephone
- 4. Address

12.2.2 How to add a new contact?

Step 1:Open the contacts tab in settings

Step 2:Click “New” button to open the form

Step 3: Fill in details.

NEW CONTACT

Save Cancel

1 First Name*:

2 Last Name:

3 Email*:

4 Telephone*:

5 Street:

6 City:

7 State:

8 Postal Code:

9 Country:

Country Search

- A. First Name
- B. Last Name
- C. Email
- D. Telephone
- E. Street
- F. City
- G. State
- H. Postal Code
- I. Country

Step 4:Click the “Save” button

This will add the new contact

12.3 Managing Places

12.3.1 Viewing places

PLACES		
#	Name	
1	Alaska	<div>EditDelete</div>
2	Arizona	<div>EditDelete</div>

- Name
- Edit/Delete

12.3.2 How to add anew place?

- Step 1 Open the places tab in settings
- Step 2 Click “New” button to open the form
- Step 3 Fill in details.

NEW PLACES

Name*

SaveCancel

1. Name

- Step 4 Click the “Save” button
- This will add the new place

Appendix

• Advance Filter Options

- 1. Phase
- 2. Contract Type
- 3. Subcontract
- 4. Prime Contract
- 5. Program Number
- 6. Contract Id
- 7. RFP#

• Program Phases

- | | | |
|----------------------------|----------------------|------------------------|
| 1. Active | 10. Error | 19. Processed |
| 2. Approved | 11. Inactive | 20. Proposal |
| 3. Approved (Pending) | 12. Locked | 21. Re-Open |
| 4. Cancelled | 13. Lost | 22. Rejected |
| 5. Cancelled (Pending) | 14. Not Submitted | 23. rejected (Pending) |
| 6. Close | 15. Open With IT | 24. Reopen |
| 7. Close - Out | 16. Open-OLD | 25. Research Pending |
| 8. Closed | 17. Pending Approval | 26. Submitted |
| 9. Contract Administration | 18. Pre-Proposal | |

• Contract Types in a Program

- | | | |
|----------------------|---------------------------|--------------------------|
| 1. Time and Material | 7. Fixed Price | 13. Cost reimbursable |
| 2. Level of efforts | 8. Level of efforts | 14. cost plus incentive |
| 3. Letter Contract | 9. Firm Fixed with EPA | 15. Cost plus Fixed fees |
| 4. Labour hours | 10. Firm Fixed Price | 16. Cost plus Award fees |
| 5. IDIQ | 11. Firm fixed Incentives | |
| 6. Fixed Unit Price | 12. Cost sharing | |

• Service Offerings in a Program

- | | | |
|------------------------------------|---|----------------------------|
| 1. Applications Development &Mgt | 8. E Communities | 14. Midrange |
| 2. Applications Maintenance | 9. Enterprise Customer Management | 15. Procurement |
| 3. Asset Mgt and Maintenance | 10. Health Care Finance Administration (HCFA) | 16. Project Support |
| 4. Business Continuity | 11. Help Desk | 17. Telecommunications |
| 5. Claims or Settlement Processing | 12. Internet Solutions & Applications | 18. Training and Education |
| 6. Consulting | 13. Mainframe | |
| 7. Desktop/Client Server | | |

• Corporate CAGE Codes

- 1. 05HD8
- 2. 1U305
- 3. 0CVK8
- 4. 24612
- 5. 00MK8
- 6. TBD
- 7. 1D6O3
- 8. 4TJT0
- 9. 39500000

• Corporate Locations

- 1. 5400 Legacy Drive, Plano, TX
- 2. 13600 EDS Drive, Herndon, VA
- 3. 225 Grandview Ave, Camp Hill, PA
- 4. 1600 North Beauregard Street, Alexandria, VA
- 5. 7900 Westpark Dr, T-600, McLean, VA
- 6. Falls Church, VA
- 7. 4646 Needmore Rd, P.O. Box 24593, Dayton, OH 45424
- 8. SafeGuard Services
- 9. NHIC

• Affiliation Types

- | | | |
|---------------------|---------------------|---------------------|
| 1. Default | 7. is a cross clai | 13. is subpoena for |
| 2. is a third part | 8. is a master agr | 14. is a cross refe |
| 3. is an addendum | 9. is a master cas | 15. is an order und |
| 4. is a counter cl | 10. is a related cl | 16. is related to |
| 5. is a consolidate | 11. is a related is | |
| 6. is consolidated | 12. is the same iss | |

• Contact Types

- 1. Awarding agency
- 2. Govt. POC
- 3. Contractor
- 4. Payment Office

• Terms and Conditions

- | | | |
|--|--|--|
| 1. Products | 35. Liquidated Damages | 65. Overtime Restrictions (FAR 52.222-2) |
| 2. Financial | 36. Government Property | 66. Restrictions or Special RegtsFor Subcontracts |
| 3. Performance | 37. Engineering Changes/Value Engineering Changes | 67. Other Special Provisions/Limitations |
| 4. Security | 38. Other (Performance) | 68. Restrictions on Subcontracting |
| 5. Corp. Risk | 39. Security Clearances | 69. Notification and/or Consent Requirements |
| 6. Key Issues | 40. DD 254 | 70. Subcontracting Plan Required |
| 7. Other | 41. Non-Publicity | 71. Subcontracting Plan Not Required |
| 8. Unusual Terms/Conditions | 42. Other (Security) | 72. List of Subcontractors |
| 9. Subcontracting | 43. System Development With Fixed Or Capped Pricing | 73. Organizational Conflict of Interest Potential |
| 10. Key Personnel | 44. Customer With Credit Risk | 74. TINA-FAR 52.215-10 |
| 11. Service Contract Act | 45. Contractual Financial Performance Penalties | 75. TINA-FAR 52.215-11 |
| 12. No Hire/No Solicitation Clause | 46. Payment Terms > 45 Days After The Month of Service | 76. TINA-FAR 52.215-12 |
| 13. Other (Labor) | 47. Pricing Adjustments Using Benchmarks, etc. | 77. TINA-FAR 52.215-13 |
| 14. Buy American Act/Trade Agreement Act | 48. Most Favored Customer Provisions | 78. Labor |
| 15. New Materials Clause | 49. Non-competition or Other Exclusivity Provisions | 79. Key Personnel |
| 16. Discounted Products/Technology Refreshments | 50. Economic and Monetary Union (EMU) Compliance | 80. Service Contract Act |
| 17. Special Test Equipment Required | 51. Year 2000 Compliance | 81. No Hire/No Solicitation Clause |
| 18. Customer Paying For Development of Product(s) | 52. Costing Based On Non-Std Infrastructure Charges | 82. Other (Labor) |
| 19. EDS Retains Ownership of Products | 53. Media Release Restrictions | 83. CAS Clauses FAR 52.230-5 |
| 20. Other (Products) | 54. Rights in Technical Data/Computer SW | 84. CAS Clauses FAR 52.230-4 |
| 21. Cost or Pricing Data Required | 55. Incorporation of Sections K, L and/or M | 85. CAS Clauses FAR 52.230-6 |
| 22. Defective Pricing Clause | 56. Commercial Terms and Conditions | 86. CAS Clauses FAR 52.230-1 |
| 23. Caps On Indirect Rates | 57. Corporate Agreements Applicable | 87. CAS Clauses FAR 52.230-2 |
| 24. FCCOM Allowed | 58. FOIA Copies Required | 88. CAS Clauses FAR 52.230-3 |
| 25. Economic Price Adjustment Clause | 59. Show Cause Provision | 89. Reporting Executive Compensation and First-Tier Subcontract Awards 52.204-10 |
| 26. FAR Penalty Clause (52.242-3) | 60. Cure Notice Provision | 90. Service Contract Reporting Requirements 52.204-14 |
| 27. Precontract or Cost Allowable Restrictions | 61. Other (Key Issues) | 91. Notice of Earned Value Management System 252.234-7001 |
| 28. Costs Specifically Unallowable By Contract Terms | 62. Truth in Negotiations Act (TINA) | 92. Earned Value Management System 252.234-7002 |
| 29. Profit or Fee Provisions In The Contract | 63. Cost Sharing (Identify Terms of Arrangement) | 93. Prohibition Of Assignment Of Claims 52.232-24 |
| 30. CAS Clauses (FARs 52.230-1 thru 52.230-6) | 64. Level of Effort (Identify Limitations) | 94. EVMS |
| 31. SEI/CCM Applicability | | |
| 32. ISO 9000 Applicability | | |
| 33. Warranty Provisions | | |
| 34. Cancellation Provisions | | |

• Order Scope

- | | | |
|--|---------------------------------------|--|
| 1. TBD | 14. Consulting services | 27. Intel |
| 2. Certification and Deployment Procedures | 15. Center outsourcing | 28. Intranet/Internet design and/or management |
| 3. Year 2000 efforts | 16. Site surveys and/or design | 29. Hardware/Software |
| 4. Product Delivery | 17. Network management | 30. Data processing |
| 5. Telecommunication | 18. Personnel systems | 31. Distance Learning |
| 6. Cable installation | 19. Seat Management | 32. Warranty and maintenance |
| 7. Program/facilities modernization | 20. Integrated Data Environment (IDE) | 33. Training |
| 8. Infrastructure Services | 21. Software | 34. Intranet/Internet/Web design and/or management |
| 9. Installation | 22. Facilities management | 35. Program management |
| 10. Logistics | 23. Emergency Management | 36. Call center/help desk |
| 11. Loan processing/management systems | 24. Outsourcing | 37. Software development |
| 12. Information Assurance | 25. Systems engineering | |
| 13. Hardware | 26. Medical information systems | |

• Order Type

- | | | |
|------------------------|---------------------------------|-------------------------|
| 1. Fixed Unit Price | 6. Firm Fixed Price | 11. Firm Fixed with EPA |
| 2. Cost Plus Incentive | 7. Cost Plus Fixed Fee | 12. Cost Plus Award Fee |
| 3. Level of Effort | 8. Fixed Price, Level-Of-Effort | 13. Cost Sharing |
| 4. Time and Materials | 9. Letter Contract | 14. IDIQ |
| 5. Cost Reimbursable | 10. Firm Fixed Incentive | 15. Labor Hour |

• Regulation

- | | | |
|----------|----------|-----------|
| 1. FAR | 6. CAR | 11. GSAM |
| 2. DFARS | 7. DARS | 12. GSAR |
| 3. NASA | 8. DIARS | 13. HHSAR |
| 4. OTHER | 9. DLAD | 14. VAAR |
| 5. AFARS | 10. DTAR | |